PORTFOLIO MANAGEMENT PROCESSES

DEFINING

ALIGNING

STRATEGIC
4.1 Develop Portfolio Strategic Plan

INPUTS
1. Organizational strategy and objectives
2. Inventory of work
3. Portfolio process assets
4. Organizational process assets
5. Enterprise environmental factors

TOOLS & TECHNIQUES
1. Portfolio component inventory
2. Strategic alignment analysis
3. Prioritization analysis

OUTPUTS
1. Portfolio strategic plan
2. Portfolio

STRATEGIC
4.2 Develop Portfolio Charter

INPUTS
1. Portfolio strategic plan
2. Portfolio process assets
3. Enterprise environmental factors

TOOLS & TECHNIQUES
1. Scenario analysis
2. Capability and capacity analysis

OUTPUTS
1. Portfolio strategic plan updates
2. Portfolio charter
3. Portfolio process assets updates

STRATEGIC
4.3 Define Portfolio Roadmap

INPUTS
1. Portfolio strategic plan
2. Portfolio charter
3. Portfolio

TOOLS & TECHNIQUES
1. Interdependency analysis
2. Cost/benefit analysis
3. Prioritization analysis

OUTPUTS
1. Portfolio roadmap

STRATEGIC
4.4 Manage Strategic Change

INPUTS
1. Portfolio strategic plan
2. Portfolio charter
3. Portfolio
4. Portfolio roadmap
5. Portfolio management plan
6. Portfolio process assets

TOOLS & TECHNIQUES
1. Stakeholder analysis
2. Gap analysis
3. Readiness assessment

OUTPUTS
1. Portfolio strategic plan updates
2. Portfolio charter updates
3. Portfolio updates
4. Portfolio roadmap updates
5. Portfolio management plan updates
6. Portfolio process assets updates

GOVERNANCE
5.1 Develop Portfolio Management Plan

INPUTS
1. Portfolio strategic plan
2. Portfolio charter
3. Portfolio roadmap
4. Portfolio process assets
5. Organizational process assets
6. Enterprise environmental factors

TOOLS & TECHNIQUES
1. Elicitation techniques
2. Portfolio organizational structure analysis
3. Integration of portfolio management plans

OUTPUTS
1. Portfolio strategic plan updates
2. Portfolio management plan
3. Portfolio process assets updates

GOVERNANCE
5.2 Define Portfolio

INPUTS
1. Portfolio strategic plan
2. Portfolio charter
3. Portfolio
4. Portfolio roadmap
5. Portfolio management plan
6. Portfolio process assets

TOOLS & TECHNIQUES
1. Portfolio component inventory
2. Portfolio component categorization techniques
3. Weighted ranking and scoring techniques

OUTPUTS
1. Portfolio updates
2. Portfolio roadmap updates
3. Portfolio management plan updates

GOVERNANCE
5.3 Optimize Portfolio

INPUTS
1. Portfolio
2. Portfolio roadmap
3. Portfolio management plan
4. Portfolio reports
5. Portfolio process assets

TOOLS & TECHNIQUES
1. Capability and capacity analysis
2. Weighted ranking and scoring techniques
3. Quantitative and qualitative analysis
4. Graphical analytical methods

OUTPUTS
1. Portfolio updates
2. Portfolio roadmap updates
3. Portfolio management plan updates
4. Portfolio reports
5. Portfolio process assets updates

PERFORMANCE
6.2 Manage Supply and Demand

INPUTS
1. Portfolio
2. Portfolio management plan
3. Portfolio reports

TOOLS & TECHNIQUES
1. Scenario analysis
2. Quantitative and qualitative analysis
3. Capability and capacity analysis

OUTPUTS
1. Portfolio updates
2. Portfolio management plan updates
3. Portfolio reports

PERFORMANCE
6.1 Develop Portfolio Performance Management Plan

INPUTS
1. Portfolio management plan
2. Portfolio process assets
3. Organizational process assets
4. Enterprise environmental factors

TOOLS & TECHNIQUES
1. Elicitation techniques
2. Portfolio management information system
3. Capability and capacity analysis

OUTPUTS
1. Portfolio management plan updates
2. Portfolio process assets updates

PERFORMANCE
6.3 Manage Portfolio Value

INPUTS
1. Portfolio roadmap
2. Portfolio management plan
3. Portfolio reports

TOOLS & TECHNIQUES
1. Elicitation techniques
2. Value scoring and measurement analysis
3. Benefits realization analysis

OUTPUTS
1. Portfolio management plan updates
2. Portfolio reports
3. Portfolio process assets updates

GOVERNANCE
5.4 Authorize Portfolio

INPUTS
1. Portfolio
2. Portfolio management plan
3. Portfolio reports

TOOLS & TECHNIQUES
1. Portfolio authorization techniques
2. Portfolio management information system

OUTPUTS
1. Portfolio updates
2. Portfolio management plan updates
3. Portfolio reports
4. Portfolio process assets updates

GOVERNANCE
5.5 Provide Portfolio Oversight

INPUTS
1. Portfolio
2. Portfolio roadmap
3. Portfolio management plan
4. Portfolio reports
5. Portfolio process assets

TOOLS & TECHNIQUES
1. Portfolio review meetings
2. Elicitation techniques

OUTPUTS
1. Portfolio updates
2. Portfolio management plan updates
3. Portfolio reports
4. Portfolio process assets updates

COMMUNICATION
7.1 Develop Portfolio Communication Management Plan

INPUTS
1. Portfolio
2. Portfolio roadmap
3. Portfolio management plan
4. Portfolio reports
5. Portfolio process assets

TOOLS & TECHNIQUES
1. Stakeholder analysis
2. Elicitation techniques
3. Communication requirements analysis

OUTPUTS
1. Portfolio management plan updates
2. Portfolio process assets updates

COMMUNICATION
7.2 Manage Portfolio Information

INPUTS
1. Portfolio
2. Portfolio management plan
3. Portfolio reports
4. Portfolio component reports
5. Portfolio process assets

TOOLS & TECHNIQUES
1. Elicitation techniques
2. Portfolio management information system
3. Communication requirements analysis
4. Communication methods

OUTPUTS
1. Portfolio management plan updates
2. Portfolio reports
3. Portfolio process assets updates

RISK
8.1 Develop Portfolio Risk Management Plan

INPUTS
1. Portfolio management plan
2. Portfolio process assets
3. Organization process assets
4. Enterprise environmental factors

TOOLS & TECHNIQUES
1. Weighted ranking and scoring techniques
2. Graphical analytical methods
3. Quantitative and qualitative analysis

OUTPUTS
1. Portfolio management plan updates
2. Portfolio process assets updates
3. Organizational process assets updates

RISK
8.2 Manage Portfolio Risks

INPUTS
1. Portfolio
2. Portfolio management plan
3. Portfolio reports
4. Portfolio process assets
5. Organizational process assets
6. Enterprise environmental factors

TOOLS & TECHNIQUES
1. Weighted ranking and scoring techniques
2. Quantitative and qualitative analysis

OUTPUTS
1. Portfolio management plan updates
2. Portfolio reports
3. Portfolio process assets updates
4. Organizational process assets updates

AUTHORIZING & CONTROLLING